

Penetration:

Capturing the globals
– the customer experience
and digital transformation



Capturing globals:

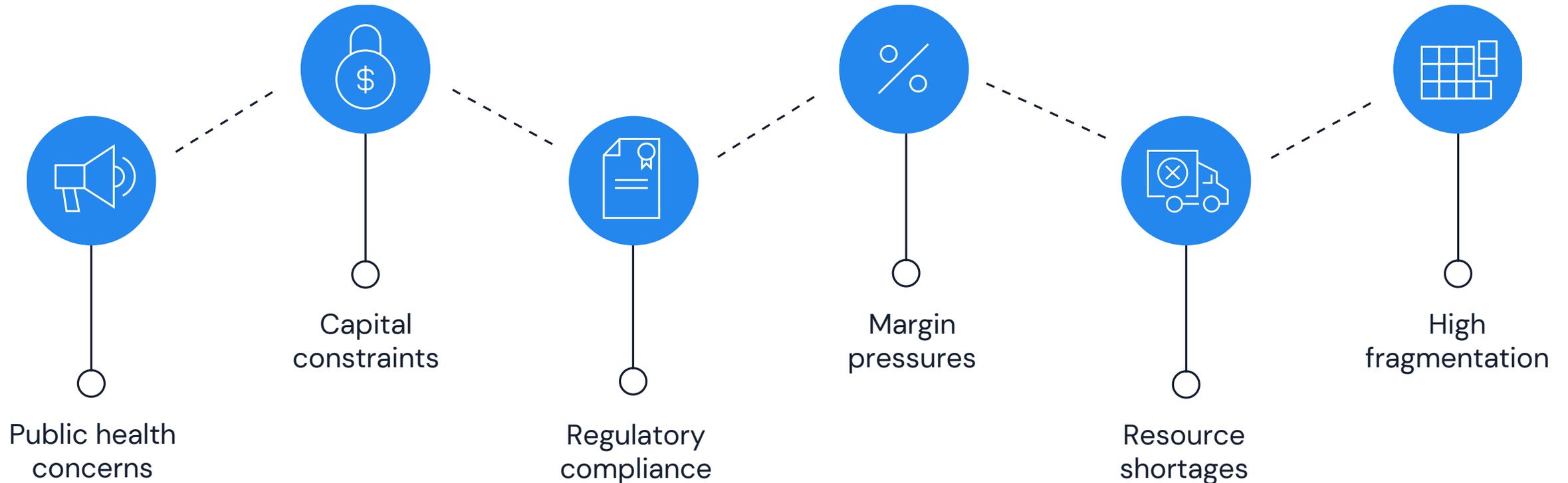
The Delta salesforce



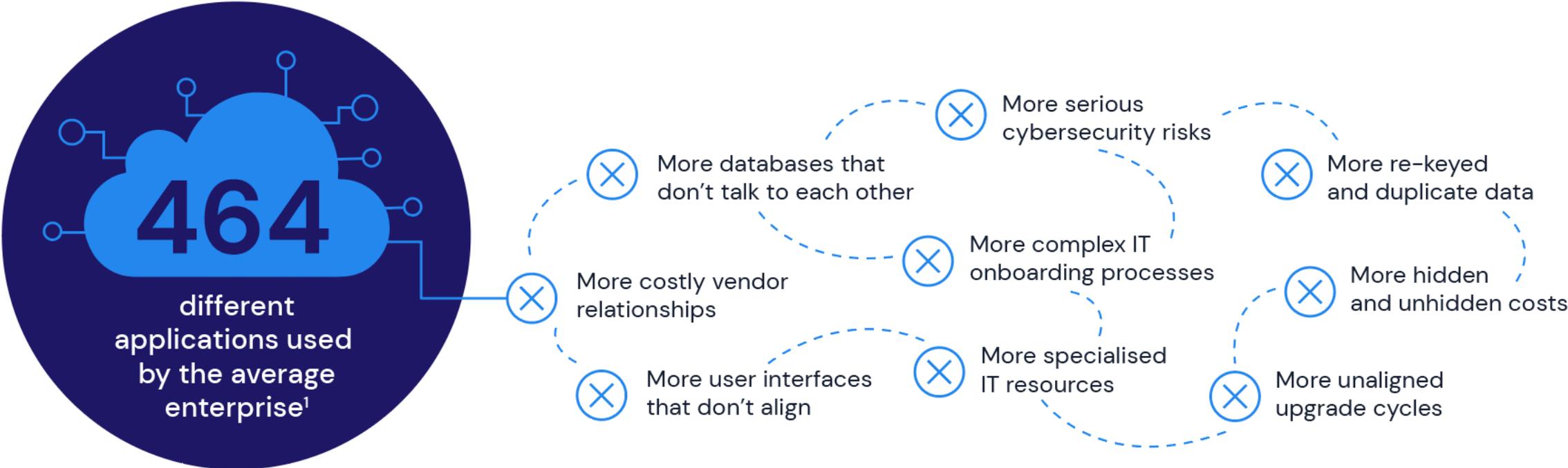
Gene Gander

General Manager, Global Sales

The logistics industry is under immense pressure to do more with less, while moving more for less



Customers cannot innovate if they are reliant on disparate, costly or unsecure systems



Our customers: third party logistics providers

42 of the top 50 third party logistics providers¹ and 30 use CargoWise

Our global platform is available across 160 countries worldwide



Our customers: global freight forwarders

25 of the top 25 global freight forwarders¹ use our solutions across 160 countries worldwide and 23 use CargoWise



“Transcending the challenges in global logistics sustainably and further developing the service quality for our customers, requires a global integrated platform that can provide end-to-end logistics execution.”

[Hellmann Worldwide Logistics²](#)

“We were looking for an enterprise-class type of solution that can help us become a global player.”

[Yusen Logistics³](#)

“We have chosen the CargoWise single platform solution which fully responds to our needs and ambitions. This new tool will gradually replace all of our existing TMS software.”

[Bolloré Logistics⁴](#)

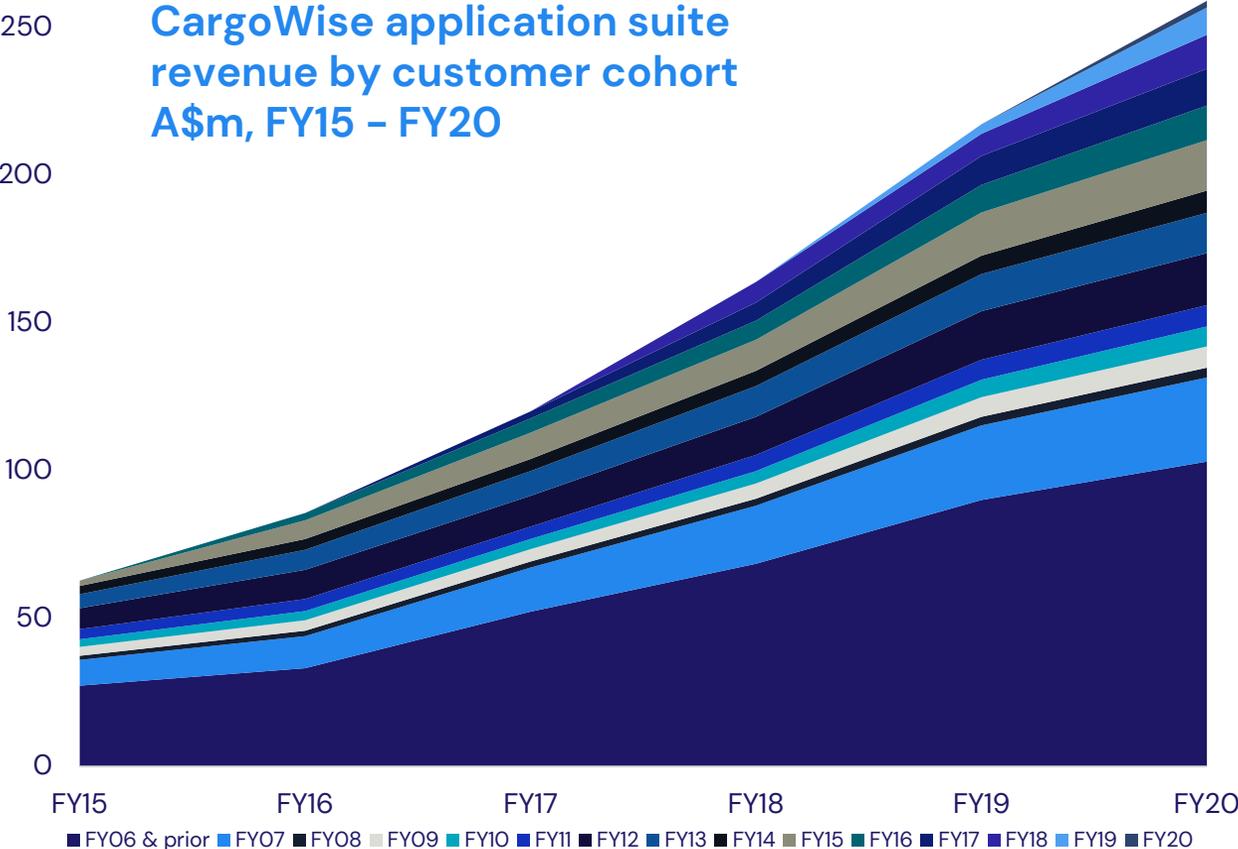
1. Armstrong & Associates: Top 25 Global Freight Forwarders List ranked by 2019 logistics gross revenue/turnover and freight forwarding volumes.

2. Hellmann Worldwide press release on 27 May 2020.

3. WiseTech Global website customer profiles – Yusen Logistics interview on 27 April 2018.

4. Lloyds Loading List article on 4 Dec 2018.

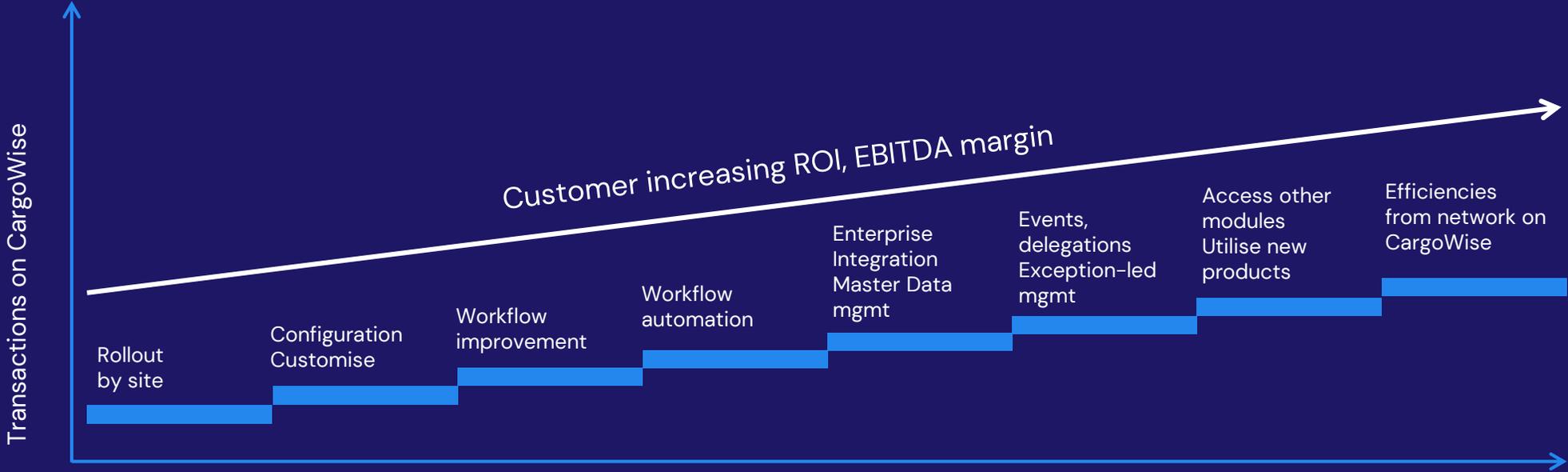
There is significant runway for increased usage and expansion across our extensive base



Increasing uptake and progress of global rollouts for the world's largest logistics providers.

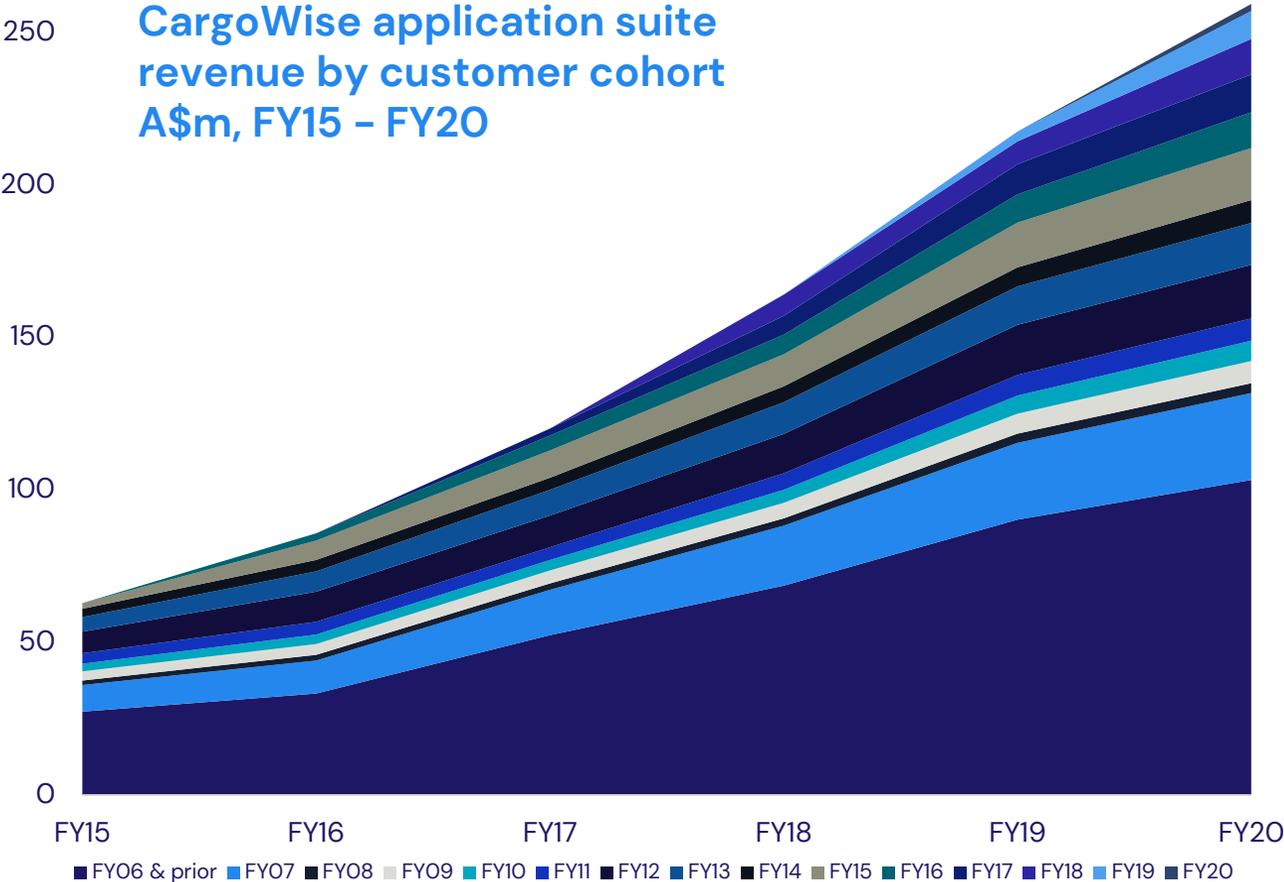
Every cohort of CargoWise customers over the last 12 years **grew revenue in FY20**.

Global rollouts take time, with significant value and future opportunity once complete



Once rolled out, customers can increase transaction throughput with progressive productivity tools and new products.

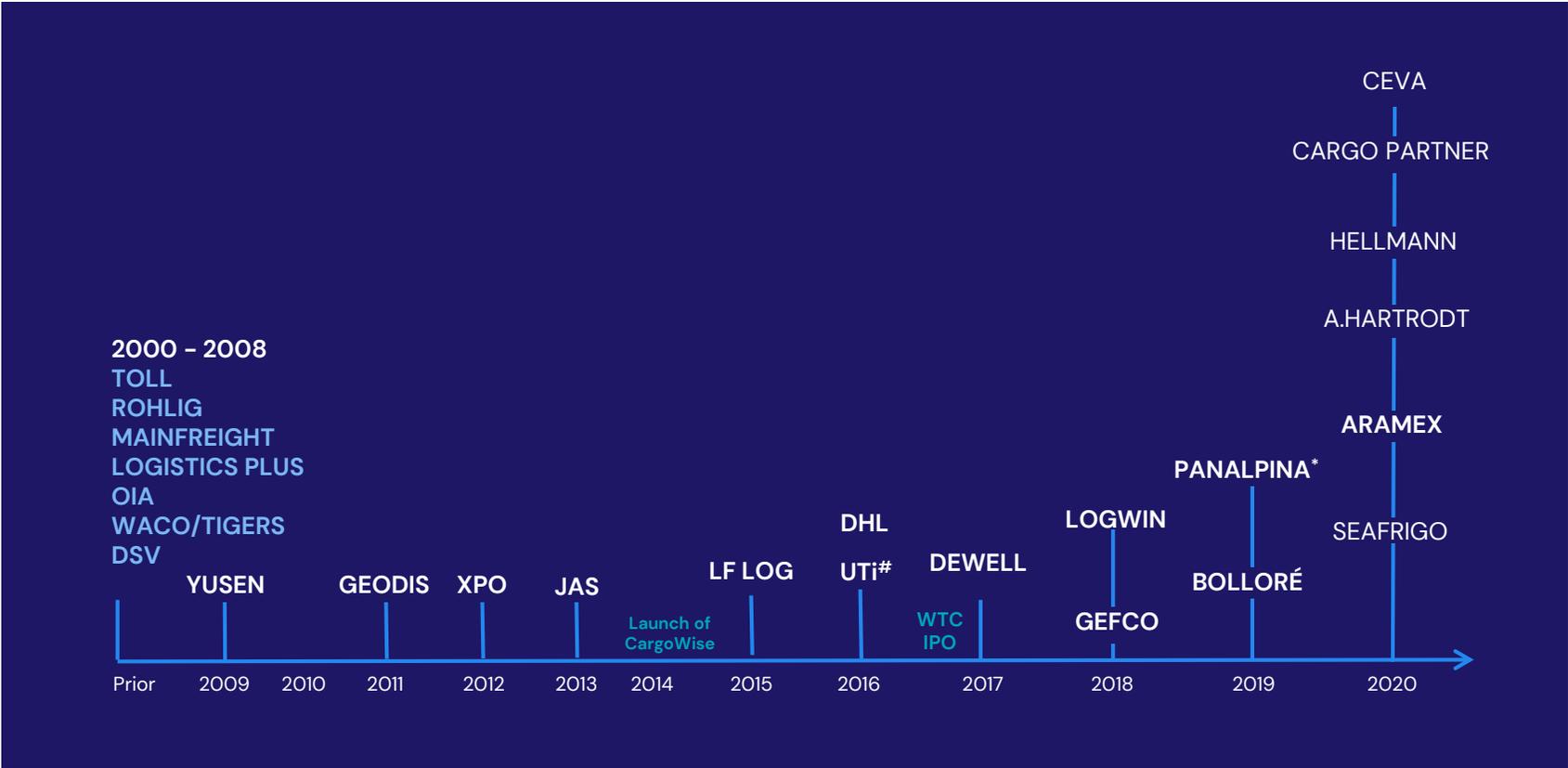
Our customers stay and grow their transaction usage due to the productivity of the platform



<1% attrition every year for the last 8 years¹

1. Annual attrition rate is a customer attrition measurement relating to the CargoWise platform (excluding any customers on acquired legacy platforms). A customer's users are included in the customer attrition calculation upon leaving i.e. having not used the product for at least four months. Based on attrition rate <1% for each year of the last 8 financial years FY13 – FY20.

Global rollouts continue to increase across 3PLs and global freight forwarders, enhancing value over time



CargoWise has 23 large global freight forwarders[^] with global rollouts in process or completed.

11 of these are in the top 25.

Recent sales acceleration and a strong pipeline are driven by a sales team reorganisation (Delta) and COVID-19 industry pressures creating conditions for change.

Uti was acquired by DSV and rolled onto CargoWise from FY16
 * Panalpina was acquired by DSV in August 2019 and DSV commenced moving major Panalpina operational activities onto CargoWise in FY20
 ^ A large global freight forwarder is defined here as having 10 or more countries and 400 or more operational staff on CargoWise

The global depth, reach and capability of CargoWise is purpose built for the needs of the world's largest logistics organisations

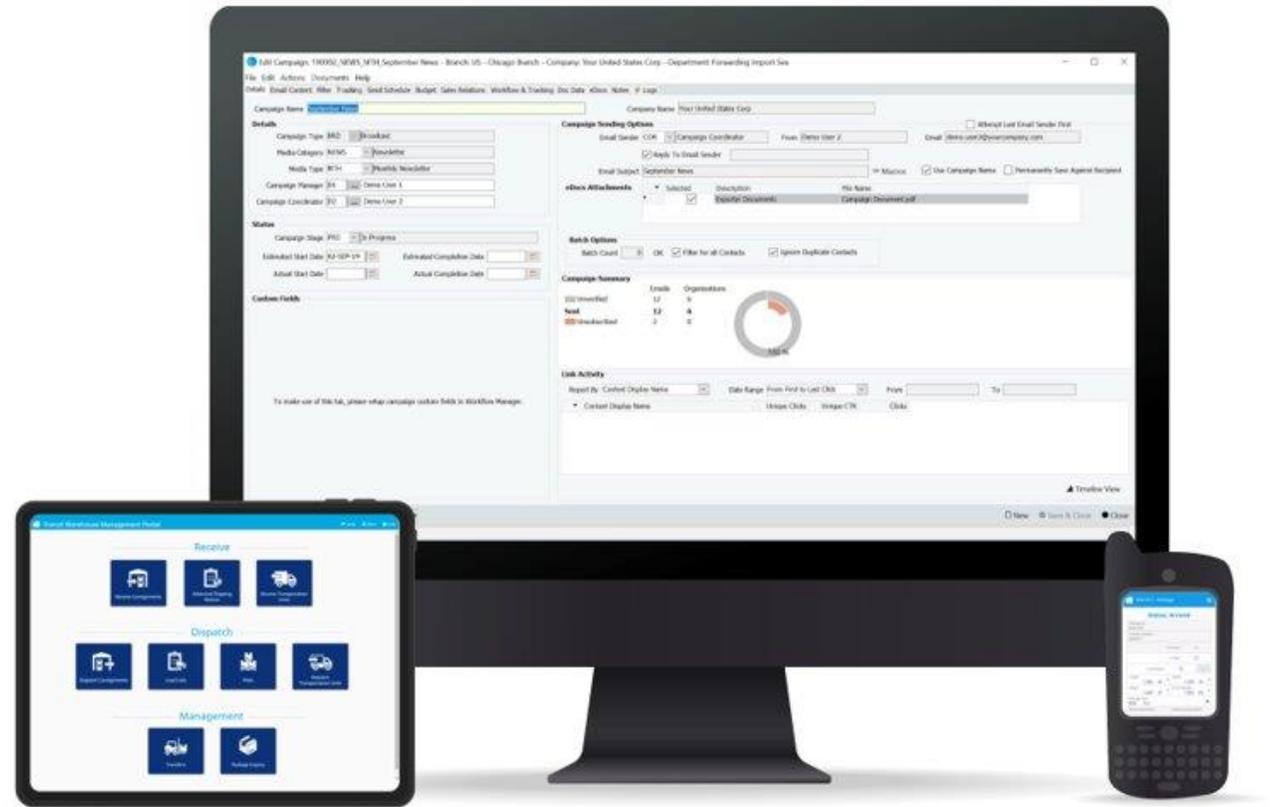


CargoWise transforms and optimises end-to-end logistics processes, putting productivity at the centre of logistics operations

160
countries

30
languages

~3,900
features and
enhancements in
the past 5 years



The customer experience:

Aramex



Mohammed Sleeq
Chief Digital Officer,
Aramex



Gene Gander
General Manager, Global Sales

Mohammed Sleeq, Chief Digital Officer (CDO)



Mohammed Sleeq joined Aramex in 2013 and was appointed CDO in December 2018.

As the company's CDO, Mr Sleeq leads Aramex's transformation aspirations, and is responsible for the execution of the company's business transformation strategy - the cornerstone of a wider strategy that will eventually lead to more efficient internal processes, upgraded customer service levels and a continuous competitive edge.

Mr Sleeq and his team are focused on driving fundamental organisational change through the use of digital technologies and business models to improve performance, enhance customer experience and optimise internal processes.

Aramex is a Global Provider of Logistics and Transportation Solutions

15,623 Employees | **600+** Offices in **65+** Countries | **AED 4.0** Billion Revenues | **AED 6.3** Billion Market Cap

Domestic Express

We understand that delivering from one side of the country to another requires efficiency and reliability of global standards and local operations that continually strive for excellence.

International Express

With Aramex International Express, sending time-sensitive documents or packages is prompt, convenient and easy.

Freight

Whether by sea, air or land, Aramex Freight provides the facilities and expertise for seamless and streamlined operations.

Logistics & Other

As a global logistics and transportation solutions provider, Aramex will help simplify customers' operations with cost-effective and comprehensive solutions.

E-Commerce

Aramex works round-the-clock to serve ebusinesses of all sizes. From customised solutions for the checkout, order fulfilment, customs clearance, international shipping, and last mile delivery to returns management.

The customer experience:

DHL



Tim Scharwath

CEO, DHL Global Forwarding, Freight



Gene Gander

General Manager, Global Sales

Tim Scharwath

Member of the Management Board of Deutsche Post DHL Group
CEO, DHL Global Forwarding, Freight



Tim Scharwath has been a Member of the Management Board of Deutsche Post DHL Group since June 2017. He is responsible for DHL's air, ocean and overland freight forwarding business.

In his previous role, Tim Scharwath led the air freight business at Kuehne+Nagel International AG as Executive Vice President and a Member of the Board since 2011. In this function, he was responsible for the global organisation of air freight, sales and marketing.

Scharwath began his career at Kuehne+Nagel Group in 1992, where he held various positions in Germany, the Netherlands and the UK before becoming Member of the Board and moving to the headquarters in Switzerland. He was charged with the migration of different country organizations, the integration of acquired companies, and the successful management of the business during the global economic downturn in 2009.

Tim Scharwath holds a degree in business administration from the University of Hamburg, Germany.



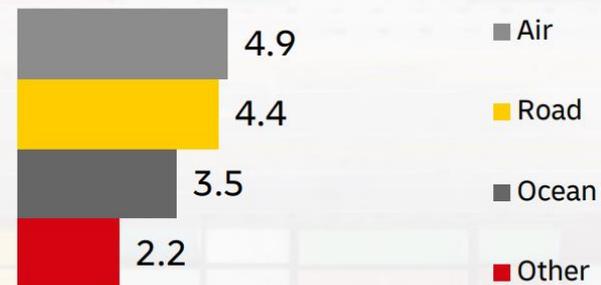
DGFF: The foundation for further success has been laid

The Profitable Core

International transportation of Air Freight, Ocean Freight and Road Freight including Customs Clearance and related Value-added Services like warehousing, cargo insurance, etc.

Revenue Mix

(€bn, FY 2019)



Market Position

(2019)

#1 Air Freight
#2 Ocean Freight
#2 European Road Freight

CargoWise roll-out progressing very well

Benefit realisation started



Ocean Freight

**considered
completed**



Air Freight

**>70%
completed**

Complete CargoWise1 roll-out by 2021



With IT Renewal Roadmap & Digital Customer Interaction, full form of DGF is enhancing customer experience while increasing operational efficiency

myDHLi 360° VISIBILITY COLLABORATION FULL ACCESS MANAGED BY CUSTOMER

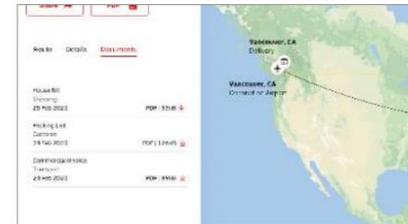
External



QUOTE + BOOK



TRACK



DOCUMENTS



ANALYTICS

IRR - IT Renewal Roadmap: Our Digital Backbone established

Internal



New TMS



Paperless forwarding



Quotation tool



Track + trace / shipment visibility



Steering Logic



... and many more



Future of the logistics industry:

Accelerating digital transformation



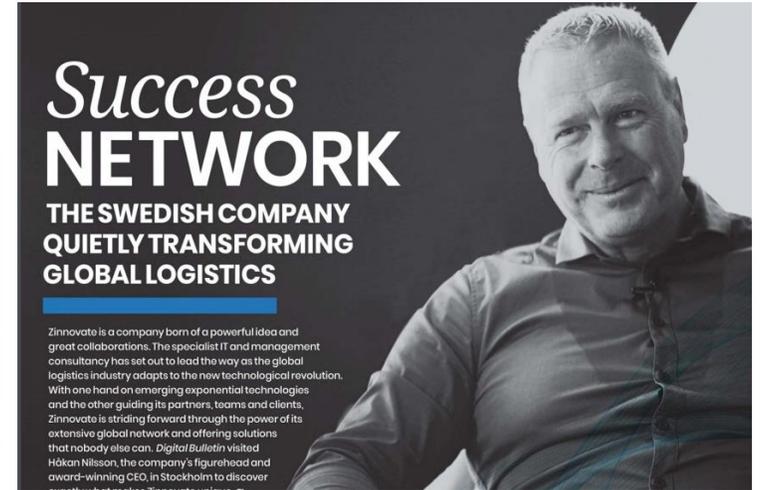
Håkan Nilsson

Chief Executive Officer,
Zinnovate International

Zinnovate is at the forefront of the logistics industry – committed to helping large-scale logistics firms realise the full value of their IT investments.



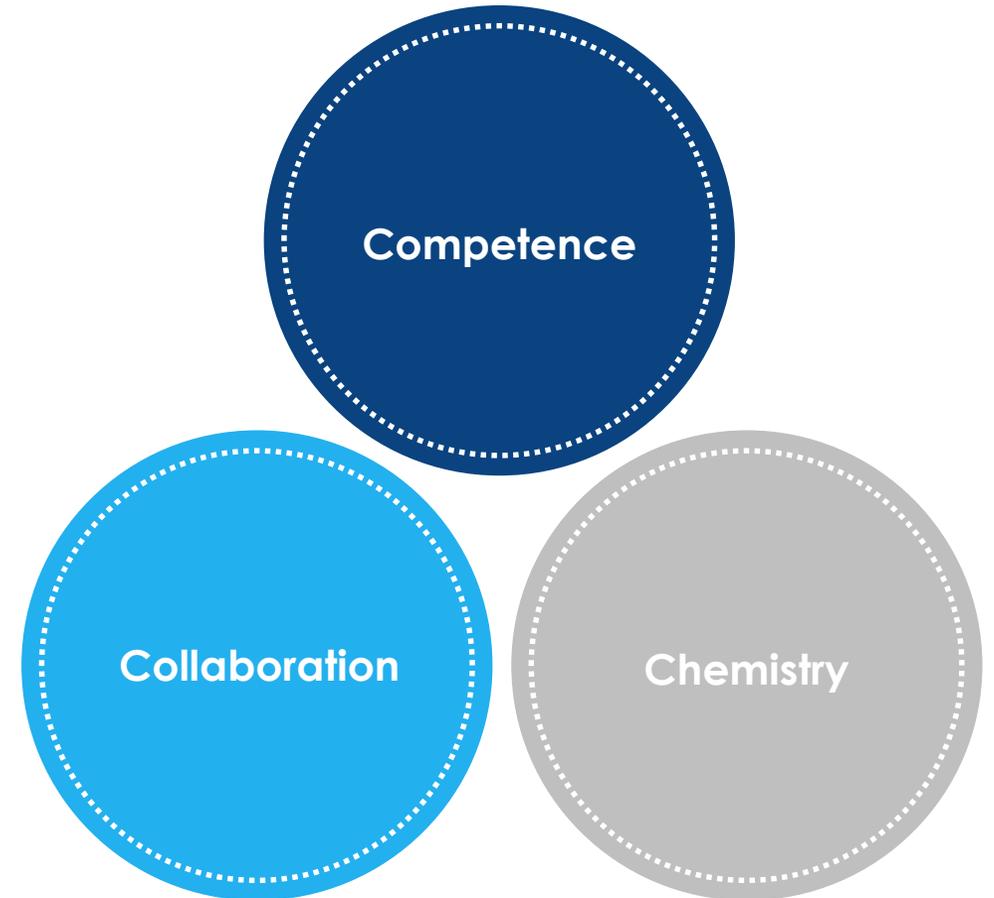
ZINNOVATE





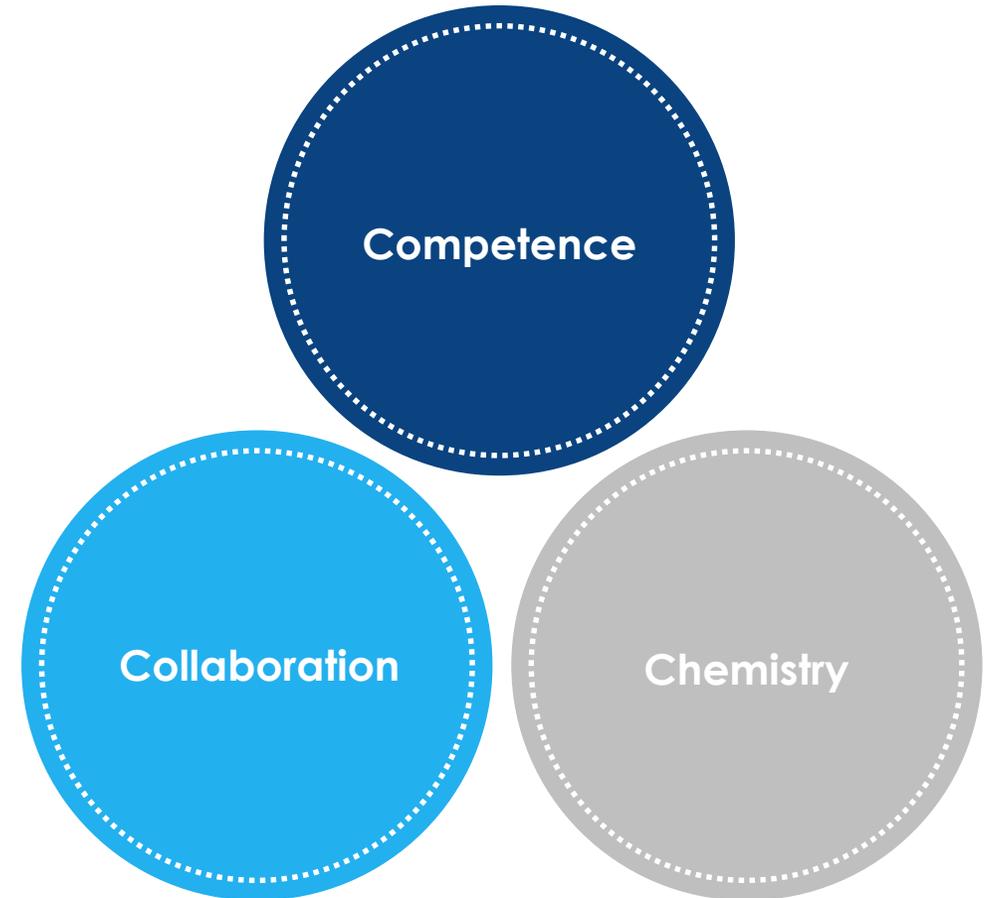
Zinnovate helps logistics organisations transform from local to global optimisation with CargoWise

- ✓ Trusted CargoWise Partner since 2013.
- ✓ Global network of 70+ consultants.
- ✓ Partner with many of CargoWise's largest customers to deliver true business transformation.
- ✓ Awarded Best Management Consultancy in the Global Logistics Industry – 2017 Business Worldwide Corporate Excellence Awards.





Our mantra is to help our customers make the whole more than the sum of its parts, across **systems, processes** and the **organisation**





CargoWise is purpose built to meet the needs of the world's largest logistics companies



Deep functionality

Optimise supply chains
across all modes
and borders



Global reach

Licensed across 160
countries and available
in 30 languages



Comprehensive integrations

Connect to government
and third party systems,
customers and partners



Highly configurable

Parameter settings
enable configuration,
to digitise at speed
and scale



A number of evolving trends are transforming the logistics industry.

1

Industry
expansion into
new territory

2

Accelerated
digital
transformation

3

Increased
ecommerce
demand



Evolving trend



Large forwarders are **expanding their reach** to become full house logistics providers, supporting customers from origin to destination.



Solution

Logistics companies need **a single platform** software solution that can optimise their supply chain across all modes and borders.



Evolving trend



The pandemic has accelerated **digital transformation**, revealing the risks of an old-school, unsecure, multiple platform technology approach.



Solution

Logistics companies need **a secure, deeply integrated** software solution to embed digital processes and drive innovation throughout their operations.



Evolving trend



The **ecommerce boom** is here to stay, with last mile delivery challenges and increasing customer expectations exacerbated by the pandemic.



Solution

Logistics companies need **one platform** for the entire international ecommerce fulfilment supply chain, enabling faster, safer and more reliable international ecommerce operations.